

USER MANUAL



Clever All In One Report Templates

Version: 2.0

Compatibility:

Odoo 8.x, 9.x, 10.x,11.x

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Introduction

Odoo Clever All in One Report Templates is a perfect solution for you as it helps you to customize store reports based on your business requirements. With the help of Odoo All in One Report Templates app, you can effortlessly manage report creation in Odoo. Feel free to customize all the fields of your reports right from the company name to customer address!

Benefits of Clever All In One Report Templates

- It is an excellent app to manage multiple reports of Odoo store creatively. This app will help to maintain reports in a superior way. Admin can set layout of the reports in multiple ways.
- There are inbuilt 6 types of report configurations for the references. Admin can change them the way it is required.
- Admin can view Payment History in the invoice to keep a check of order details.
- Admin can set Text Colors, Company Details Colors and also can add product description in the Invoice. Admin can choose diverse colors with Color Picker.
- Admin will be able to manage templates of Invoices, Sales Orders, Purchase Orders and Request for Quotation, Delivery Notes and Item Pick up Notes.

Pre-requisites

Following points must be followed before starting the Plugin installation:

- You should login as an Admin in Odoo.
- Check that your Odoo Instance is compatible for Clever All In One Report Templates.
- An e-commerce module should be present in your instance to use this app.

Installation

Installation Steps

Step 1: Download and extract the zip file.

Step 2: Check your Odoo add-ons path.

- It should be same as defined in Odoo Config file.
- Config files are mostly saved in /etc folder. For e.g. /etc/odoo.conf
- Open Config file:
 - Give the command: `sudo/etc/odoo.conf`
 - Config file content: `addons_path = /opt/odoo/addons`

Step 3: Open Terminal and go to download location

- For e.g. if the download location path is: /home/odoo/Downloads then the command to be written in the terminal would be: `cd/home/odoo/Downloads`

Step 4: Copy download modules to addons path

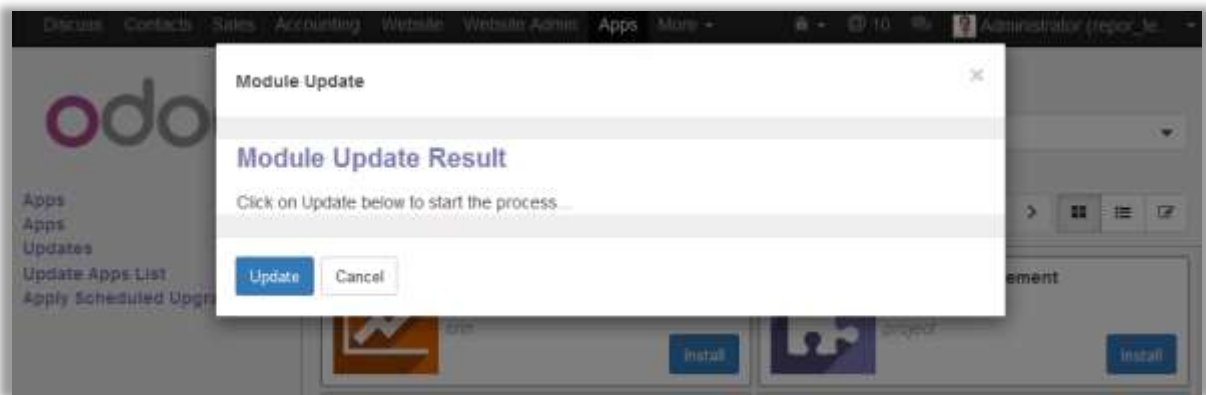
- Give the below mentioned commands to perform copy operation:
 - `$cd /home/odoo/Downloads/general_template`
 - `$cd v8`
 - `$sudocp general_template/opt/odoo/addons`

Step 5: Restart Odoo server

Step 6: Login with the admin credentials in your odoo instance.

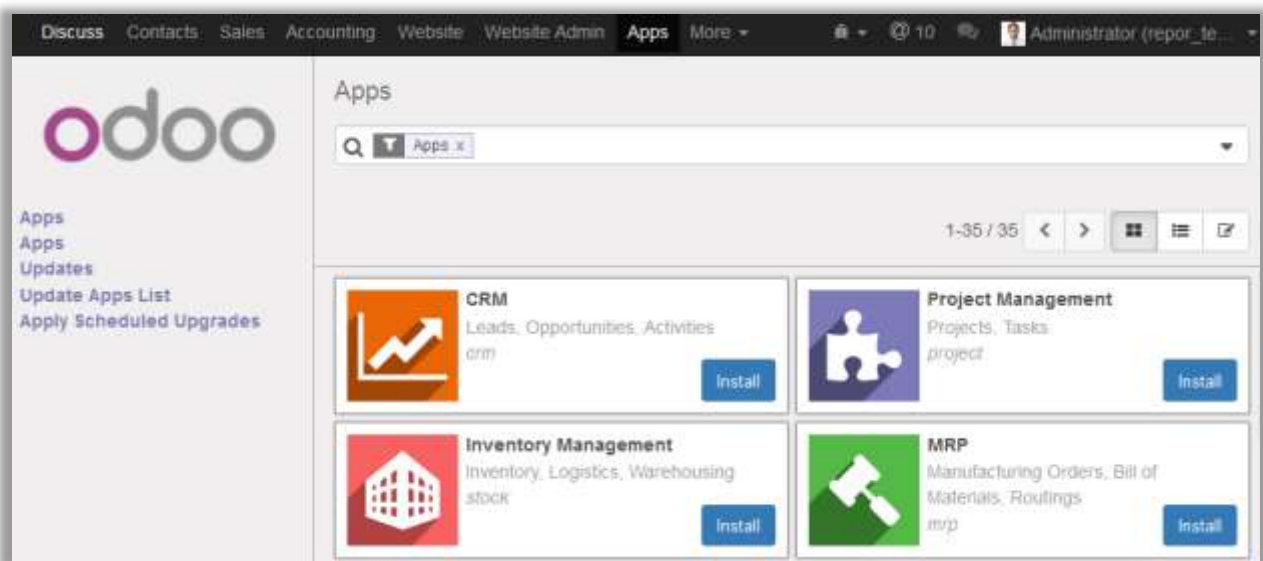
Step 7: Go to Apps/Update Apps List.

- Click on 'Update' button.



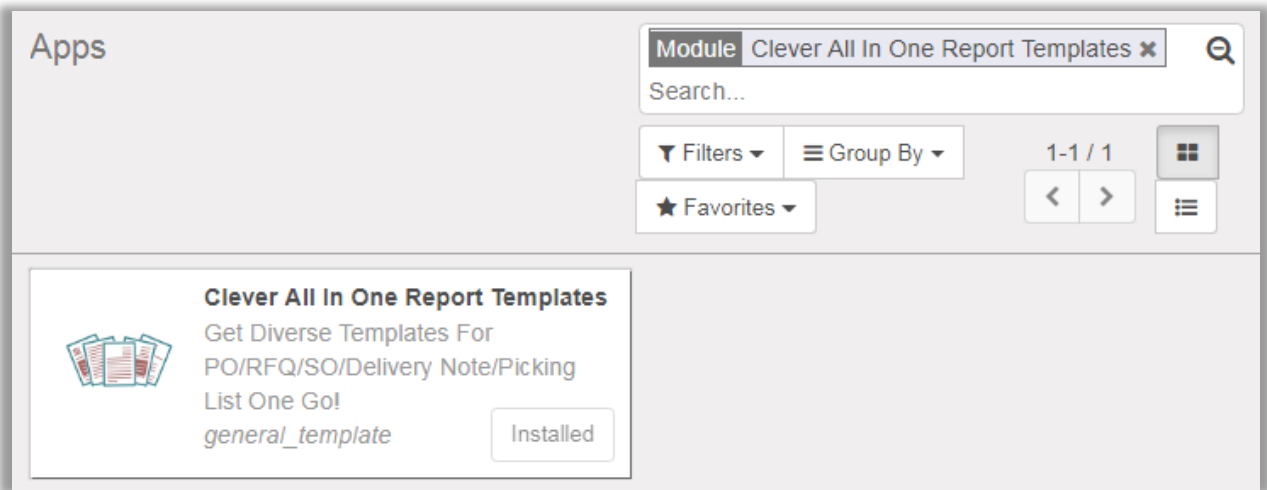
Step 8: Go to Apps

- Remove search filter.



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- Enter module name in the search box provided in the top right corner of the page. For e.g. here write “Clever All In One Report Templates”.
- Click on ‘Install’ button.



App Configuration

Configuring Report Templates

- Go to **Settings** -> **Companies**.
- Select your company and click on '**Report Configurations**'. Now click on '**Edit**' to edit the template.

Set the Custom Footer

- To set custom footer enable '**Custom Footer**' option.
- Add the required Footer in '**Report Footer**' text field.
- Select the format of paper as required from '**Paper Format**' dropdown list.



The screenshot displays the 'Configuration' settings page. It features three main sections: 'Custom Footer' with a checked checkbox, 'Report Footer' with a text area containing contact information, and 'Paper format' with a dropdown menu set to 'US Letter' and an external link icon.

Configuration	
Custom Footer	<input checked="" type="checkbox"/>
Report Footer	<div>Phone: +1 555 123 8069 Email: info@yourcompany.example.com Website: http://www.example.com</div>
Paper format	<div>US Letter  </div>

Set Default Template Settings

Default Template Settings

Quotation/Order Template	Advanced	Invoice Template	Elegant
Purchase Order Template	Contemporary	Delivery Note Template	Exclusive
RFQ Template	Creative	Picking List Template	Incredible


- To set the default template for each of the reports, navigate to **'Default Template Settings'** and choose the default template for each of the following:
 - **Quotation/Order Template:** Choose the default template for **'Quotation/Order Report'**.
 - **Purchase Order Template:** Choose the default template for **'Purchase Order Report'**.
 - **RFQ Template:** Choose the default template for **'RFQ Report'**.
 - **Invoice Template:** Choose the default template for **'Invoice Report'**.
 - **Delivery Note Template:** Choose the default template for **'Delivery Note Report'**.
 - **Picking List Template:** Choose the default template for **'Picking List Report'**.

Set Default Report Settings

Default Report Settings

Preview Template

Report Logo



Standard Template Configuration

Contemporary

Template Base Color

#a24689

Template Text Color

#030103

General Text Color

#120612

Company Name Color

#5151fc

Company Address Color

#4b4bd6

Display Company Name in Bold

☐

Display Amount In Word

☒

Report Watermark Logo




Table Odd Parity Color

#FFFFFF

Table Even Parity Color

#e6e8ed

Customer Name Color

#000000

Customer Address Color

#000000

Display Product Description

☒

Display Customer Name in Bold

☒

Display Product Image

☒

- To set the Default Report Settings navigate to ‘**Default Report Settings**’ section manage following options:
 - Template Preview:** Template preview will be shown on the basis of chosen Standard Template.
 - Standard Template Configuration:** Choose the default template for all the Reports from following 6 Options:
 - Contemporary
 - Elegant
 - Creative
 - Professional
 - Advanced
 - Exclusive
 - Report Logo:** Set the Report Logo for the reports.
 - Template Base Color:** Set the Template Base Color for the reports.
 - Template Text Color:** Set the Template Text Color for the reports.
 - General Text Color:** Set the General Text Color for the reports.
 - Company Address Color:** Set the Company Address Color for the reports.


- **Report Watermark Logo:** Set Watermark for the reports.
- **Table Odd Parity Color:** Set Table Odd Parity Color for the reports.
- **Table Even Parity Color:** Set Table Even Parity Color for the reports.
- **Customer Name Color:** Set the Customer Name Color for the reports.
- **Customer Address Color:** Set the Customer Address Color for the reports.
- **Display Product Description:** Enable 'Display Product Description' to display product description in the reports.
- **Display Customer Name in Bold:** Enable 'Display Customer Name in Bold' for showing name of customer in Bold in the reports.
- **Display Company Name in Bold:** Enable 'Display Company Name in Bold' for showing name of company in Bold in the reports.
- **Display Product Image:** Enable 'Display Product Image' for showing the product images in the reports.
- Admin can choose any color for the editable text fields with the color picker



NOTE: Watermark feature is not provided for Odoo v8.0

Setting Different Template for Customer

- Go to **Sales -> Customers**.
- Select the customer for whom you want to set template and click on **'Edit'** to set the default template for the selected customer.
- Click on **'Report Configuration'** and choose the templates for the following reports:
 - Invoices
 - Sales Order
 - Delivery Note
 - Purchase Order
 - RFQ Template
 - Picking List



ASUSTeK

Not Archived

1 Vendor Bills.

2 Purchases

2 Analytic Acc...

Address

31 Hong Kong street
Taipei 106
Taiwan

Phone

(+886) (02) 4162 2023

Website

<http://www.asustek.com>

Mobile

Fax

Email

asustek@yourcompany.example.com

Language

Tags

Distributor

Office Supplies

Contacts & Addresses

Internal Notes

Sales & Purchases

Accounting

Report Configuration

Default Report Settings

Invoice Template	Contemporary	Purchase Order Template	Professional
Sale Order Template	Creative	RFQ Template	Advanced
Delivery Note Template	Exclusive	Picking List Template	Elegant

Setting Currency for the Report

- Go to Sales -> Customers.
- Now select the customer for which you want to set specific currency language and click on 'Edit' to set the currency language from 'Language' dropdown list.

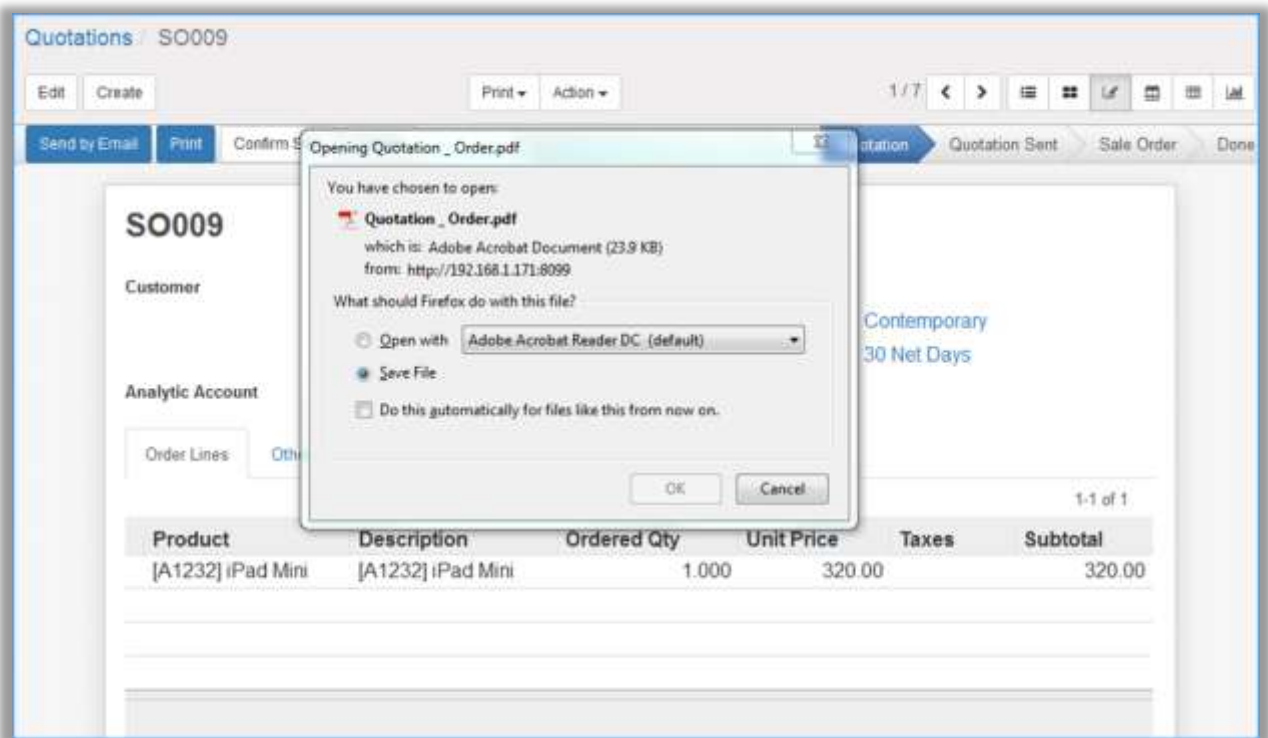
The screenshot shows a customer profile for 'Agrolait'. At the top, there's a header with the Agrolait logo, a tab selector for 'Individual' and 'Company', and a summary bar showing 'Active' status, '\$1,175.00 Invoiced', and '\$ 2 Sales'. The main form is divided into several sections: 'Address' with fields for street, city (Wavre), state, zip (1300), and country (Belgium); 'Website' with a URL field; 'Tags' with 'Components Buyer' and 'Partner / IT Services'; 'Phone', 'Mobile', and 'Fax' fields; 'Email' with an email address; and 'Language' with a dropdown menu. The 'Language' dropdown is open, showing options: 'English', 'Arabic / العربية', 'English', 'French / Français', and 'German / Deutsch' (which is highlighted in blue).

Field	Value
Company	Agrolait
Status	Active
Invoiced	\$1,175.00
Sales	\$ 2
Address	69 rue de Namur Street 2... Wavre State 1300 Belgium
Website	http://www.agrolait.com
Tags	Components Buyer Partner / IT Services
Phone	+32 10 588 558
Mobile	
Fax	
Email	agrolait@yourcompany.example.com
Language	English (dropdown menu open showing: Arabic / العربية, English, French / Français, German / Deutsch)

Printing the Reports

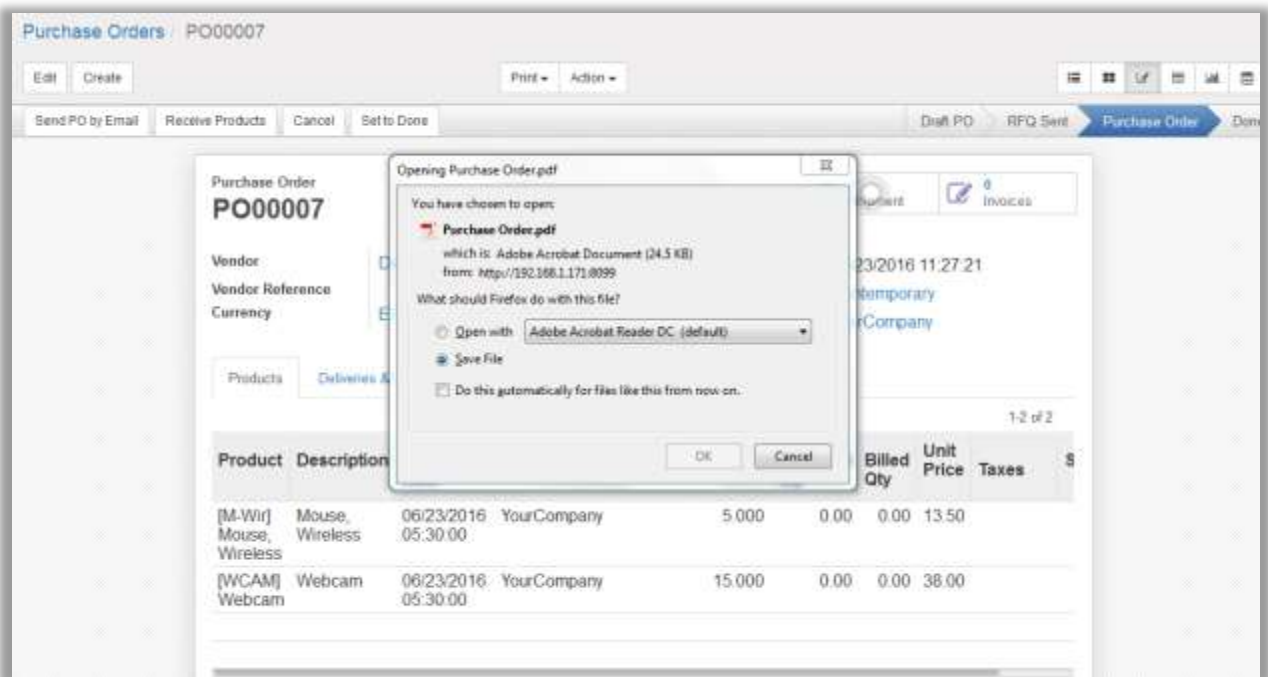
Printing Quotations / Sales Orders

- Go to **Sales -> Quotations**.
- Select any Quotation that is to be printed.
- Click on **'Print'** to print the Quotation / Sales Orders.



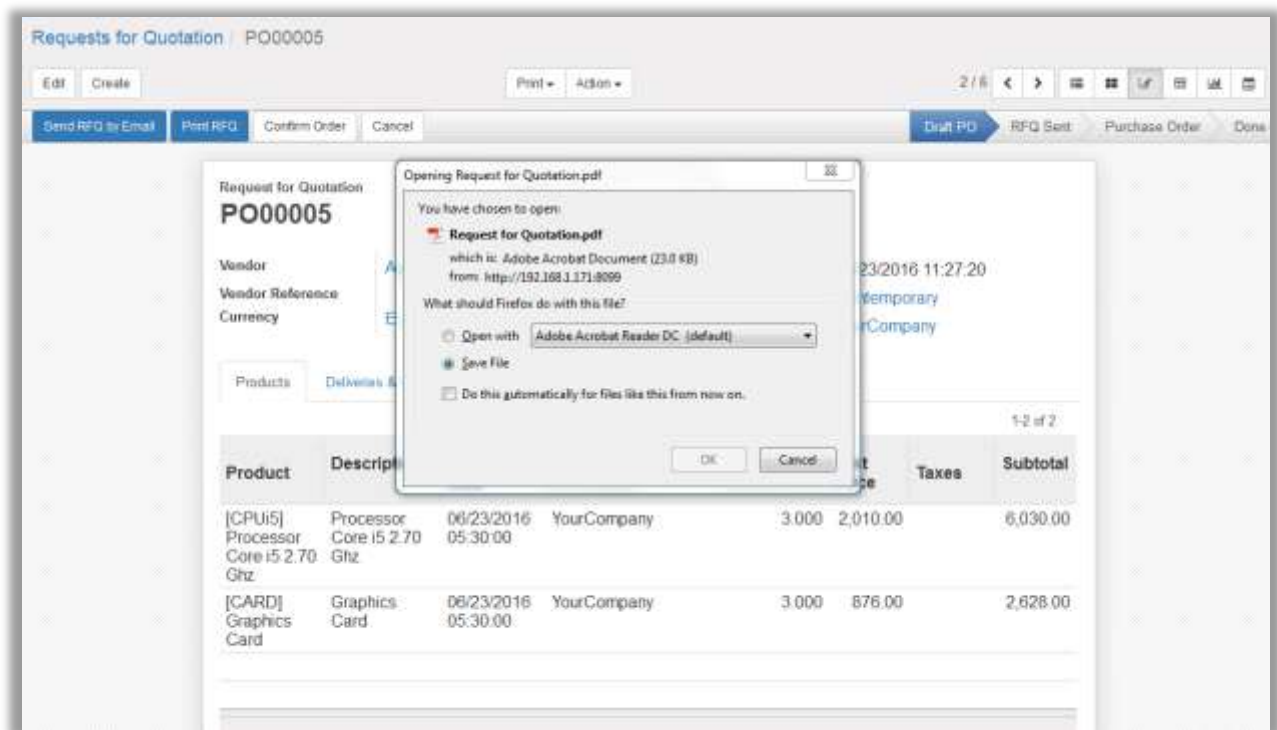
Printing the Purchase Orders

- Go to **Purchases -> Purchase Orders**.
- Select any Purchase Order that is to be printed.
- Click on **Print -> Purchase Order** to print the Purchase Order.



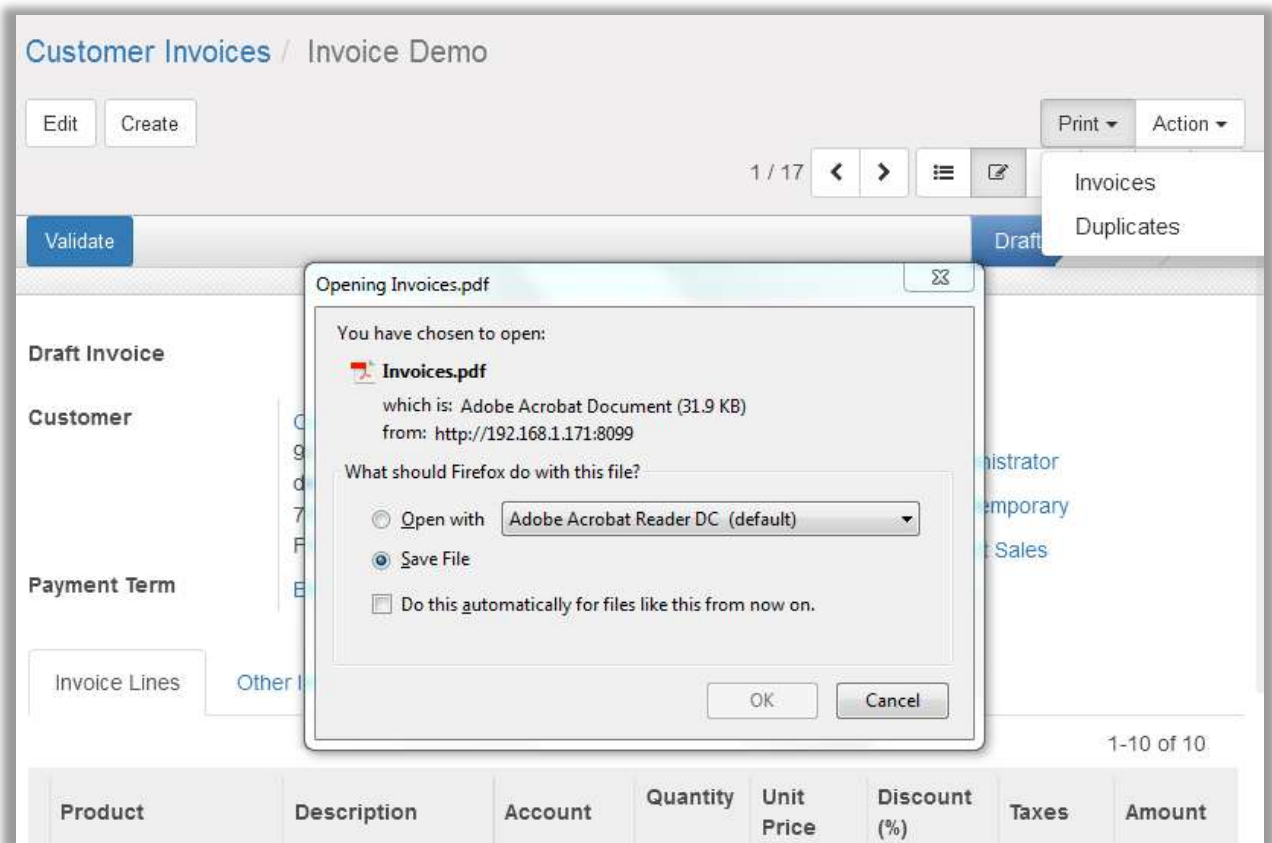
Printing the Request for Quotation

- Go to **Purchases -> Request for Quotation**.
- Select any Quotation that you need to print.
- Click on **Print -> Request for Quotation** to print the invoice.



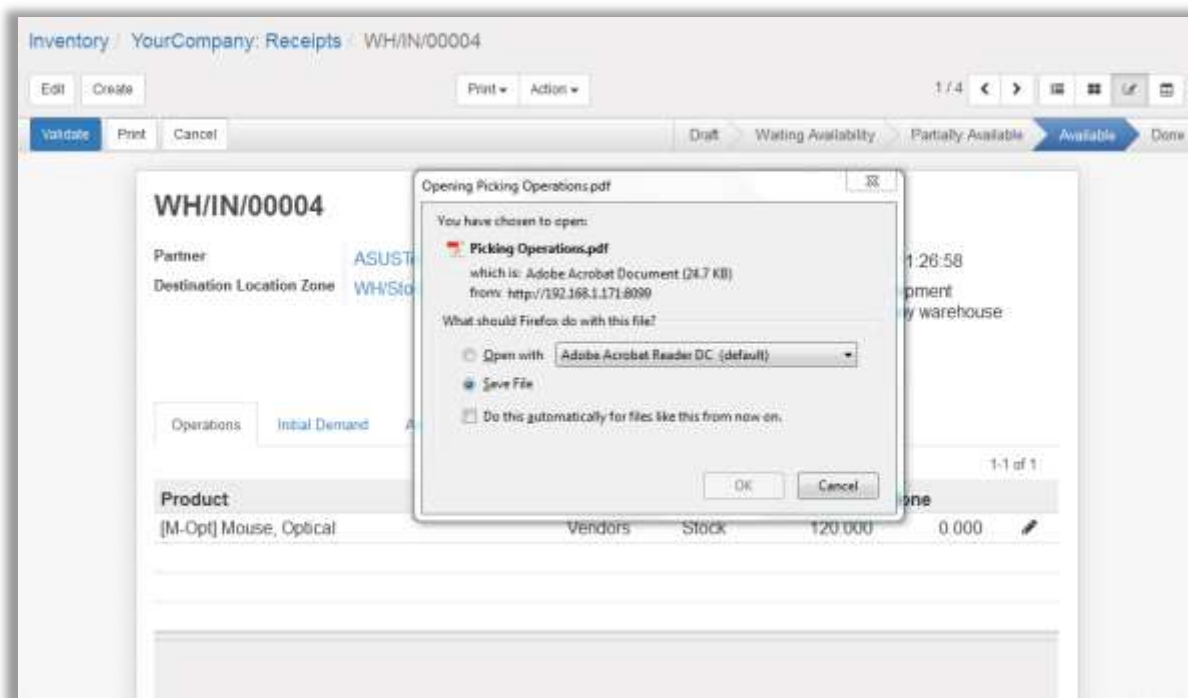
Printing the Invoice

- Go to **Accounting -> Customer Invoices**.
- Select any Invoice that you need to print.
- Click on **'Print'** dropdown list and choose **'Duplicates'** option to print the invoice.

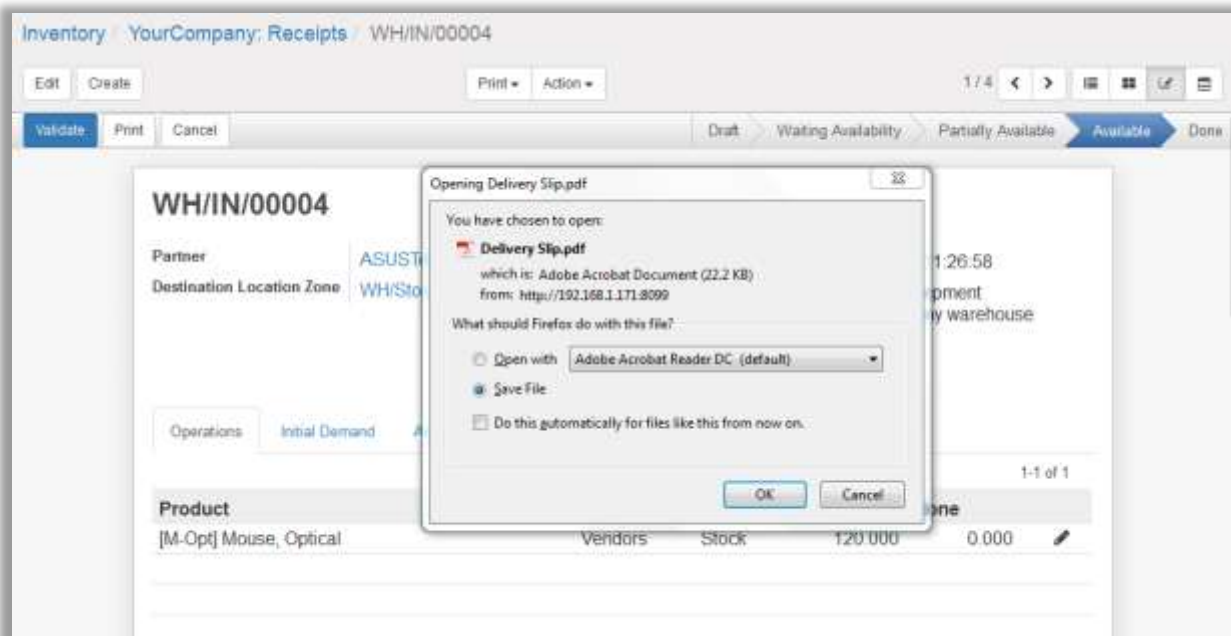


Printing the Delivery Notes / Picking List

- Go to **Inventory -> Receipts / Internal Transfers / Delivery Orders** of any Company.
- Select any order that is to be printed.
- Click on **Print -> Picking Operations** to print Picking List.



- Click on **Print -> Delivery Slip** to print Picking List.



Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/odoo-clever-all-in-one-report-templates.htm> and click on the Live Chat button for instant support.



Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to my account www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional features for **Odoo Clever All in One Report Templates App**, please write to sales@appjetty.com